

192 tasks you can delegate to a virtual assistant

A practical checklist of everyday work a virtual assistant can take off your plate, grouped into 16 areas of your business. Tick the tasks you want to hand over.

HOW TO USE THIS CHECKLIST

Find the hours you can win back

Most business owners spend hours every week on work someone else could do. Go through each area, tick every task you do yourself today, then bring the list to your free consultation.

1

Tick what you do now

Be honest. If you do it more than once a month, tick it.

2

Circle the repeats

Tasks that repeat every week and follow the same steps are the easiest to hand over first.

3

Keep the decisions

Keep pricing, hiring and key client relationships for yourself. Your VA prepares; you decide.

4

Bring it to your call

We'll turn your ticks into a job description, recommend a plan and give you a clear cost.

Start small. Hand over three to five tasks in the first week, record yourself doing each one once, and add more as your VA settles in. Our free guide [How to onboard your first virtual assistant](#) has a 30-day plan.

Calendar and scheduling

- 1 ☐ Schedule meetings and calls
- 2 ☐ Set reminders for important events
- 3 ☐ Confirm appointments
- 4 ☐ Coordinate availability between parties
- 5 ☐ Block off focus or travel time
- 6 ☐ Reschedule or cancel appointments
- 7 ☐ Add birthdays and milestones to the calendar
- 8 ☐ Manage multiple time zones
- 9 ☐ Send calendar invites
- 10 ☐ Sync calendars across platforms
- 11 ☐ Add buffer time around meetings
- 12 ☐ Add meeting links and details to invites

Customer service

- 25 ☐ Respond to customer queries
- 26 ☐ Handle complaints professionally
- 27 ☐ Provide product and service information
- 28 ☐ Send follow-up emails or calls
- 29 ☐ Manage contact forms
- 30 ☐ Monitor and reply to reviews
- 31 ☐ Thank clients for their feedback
- 32 ☐ Create FAQ responses
- 33 ☐ Schedule support callbacks
- 34 ☐ Track and manage support tickets
- 35 ☐ Tag messages to spot trends
- 36 ☐ Keep a list of requested features or ideas

Email management

- 13 ☐ Filter and prioritise emails
- 14 ☐ Draft and send responses
- 15 ☐ Unsubscribe from junk mail
- 16 ☐ Create reply templates for common questions
- 17 ☐ Organise folders and labels
- 18 ☐ Flag urgent messages
- 19 ☐ Forward invoices and receipts to your bookkeeper
- 20 ☐ Set up auto-responders
- 21 ☐ Archive old emails
- 22 ☐ Monitor the inbox daily
- 23 ☐ Keep your contact lists up to date
- 24 ☐ Send a short daily summary of what needs attention

Administrative support

- 37 ☐ Enter data
- 38 ☐ Prepare documents
- 39 ☐ Complete simple online forms and applications
- 40 ☐ Format reports
- 41 ☐ Organise digital files
- 42 ☐ Create and update spreadsheets
- 43 ☐ Generate reports
- 44 ☐ Create slide presentations
- 45 ☐ Order office supplies
- 46 ☐ Track expenses and receipts
- 47 ☐ Send documents for digital signature and follow up
- 48 ☐ Archive old files at the end of each month

Project and task management

- 49 ☐ Assign tasks
- 50 ☐ Track deadlines
- 51 ☐ Update progress reports
- 52 ☐ Set reminders for tasks
- 53 ☐ Manage Trello, Asana or ClickUp boards
- 54 ☐ Follow up with team members
- 55 ☐ Keep project documentation up to date
- 56 ☐ Build standard operating procedures (SOPs)
- 57 ☐ Streamline workflows
- 58 ☐ Organise internal checklists
- 59 ☐ Coordinate handovers between team members
- 60 ☐ Note change requests and decisions

Human resources support

- 73 ☐ Post job ads
- 74 ☐ Screen résumés
- 75 ☐ Schedule interviews
- 76 ☐ Send job offers
- 77 ☐ Create onboarding checklists
- 78 ☐ Send new-hire paperwork
- 79 ☐ Track employee anniversaries
- 80 ☐ Organise performance reviews
- 81 ☐ Help with offboarding
- 82 ☐ Maintain training materials
- 83 ☐ Track leave requests in a shared sheet
- 84 ☐ Enrol staff in training and keep records

Bookkeeping and finance

- 61 ☐ Send invoices
- 62 ☐ Follow up on payments
- 63 ☐ Reconcile receipts
- 64 ☐ Record expenses
- 65 ☐ Manage petty cash reports
- 66 ☐ Update budget trackers
- 67 ☐ Generate financial summaries
- 68 ☐ Help prepare payroll
- 69 ☐ Categorise transactions
- 70 ☐ Prepare documents for your accountant
- 71 ☐ Match payouts from your payment system to orders
- 72 ☐ Set up bills for your approval

Website support

- 85 ☐ Update website content
- 86 ☐ Upload blog posts
- 87 ☐ Add images and videos
- 88 ☐ Check for broken links
- 89 ☐ Optimise pages for search engines
- 90 ☐ Manage plugins and updates
- 91 ☐ Back up the website regularly
- 92 ☐ Track web analytics
- 93 ☐ Install pop-ups and forms
- 94 ☐ Coordinate with web developers
- 95 ☐ Add image captions and alt text
- 96 ☐ Build FAQ pages from common questions

Sales and lead generation

- 97 ☐ Respond to new leads
- 98 ☐ Qualify potential clients
- 99 ☐ Create quotes and proposals
- 100 ☐ Enter leads into your CRM
- 101 ☐ Follow up with leads
- 102 ☐ Send introduction emails
- 103 ☐ Schedule discovery calls
- 104 ☐ Research potential clients
- 105 ☐ Track the sales pipeline
- 106 ☐ Log conversions and close rates
- 107 ☐ Track when contracts are signed
- 108 ☐ Save call notes in the right place

Graphic design

- 121 ☐ Create Canva graphics
- 122 ☐ Design social media visuals
- 123 ☐ Make quote graphics
- 124 ☐ Create branded templates
- 125 ☐ Design newsletters
- 126 ☐ Design flyers and posters
- 127 ☐ Create digital business cards
- 128 ☐ Format presentation slides
- 129 ☐ Create eBook covers
- 130 ☐ Make branded PDFs
- 131 ☐ Find royalty-free images and add credits
- 132 ☐ Create simple letter, quote and invoice templates

Social media management

- 109 ☐ Plan the content calendar
- 110 ☐ Write captions
- 111 ☐ Design basic graphics
- 112 ☐ Schedule posts
- 113 ☐ Monitor messages and comments
- 114 ☐ Respond to followers
- 115 ☐ Analyse performance
- 116 ☐ Create social media reports
- 117 ☐ Research hashtags
- 118 ☐ Engage with followers
- 119 ☐ Update bios, links and pinned posts
- 120 ☐ Keep your community group friendly and on topic

Content creation

- 133 ☐ Write blog articles
- 134 ☐ Proofread documents
- 135 ☐ Rewrite bios and about pages
- 136 ☐ Write video scripts
- 137 ☐ Summarise research
- 138 ☐ Turn audio into articles
- 139 ☐ Draft email newsletters
- 140 ☐ Update product descriptions
- 141 ☐ Format long-form content
- 142 ☐ Write calls to action
- 143 ☐ Draft case study outlines from your notes
- 144 ☐ Keep an editorial calendar up to date

Email marketing

- 145 ☐ Build email templates
- 146 ☐ Segment email lists
- 147 ☐ Schedule email campaigns
- 148 ☐ Create drip campaigns
- 149 ☐ Analyse open and click rates
- 150 ☐ A/B test subject lines
- 151 ☐ Update subscriber lists
- 152 ☐ Clean bounced or unsubscribed emails
- 153 ☐ Write a welcome series
- 154 ☐ Connect email forms to your CRM
- 155 ☐ Test links and images before a send
- 156 ☐ Use tracking links so you can see results

Research

- 169 ☐ Research topics you need answers on
- 170 ☐ Research tools and software
- 171 ☐ Research suppliers and vendors
- 172 ☐ Research client leads
- 173 ☐ Find industry statistics and trends
- 174 ☐ Look for speaking and podcast opportunities
- 175 ☐ Research awards and grants
- 176 ☐ Collect testimonials and case studies
- 177 ☐ Source online training options
- 178 ☐ Create comparison sheets
- 179 ☐ Build a media list of relevant journalists
- 180 ☐ Find decision-makers and their public email addresses

Video and audio support

- 157 ☐ Transcribe videos
- 158 ☐ Upload YouTube videos
- 159 ☐ Write video descriptions
- 160 ☐ Add tags and thumbnails
- 161 ☐ Clip short segments for social media
- 162 ☐ Schedule podcast episodes
- 163 ☐ Edit audio with basic tools
- 164 ☐ Upload podcasts to platforms
- 165 ☐ Track podcast stats
- 166 ☐ Check rights and permissions
- 167 ☐ Turn recordings into short summaries
- 168 ☐ Create captions and subtitles and upload them

Online store and marketplace

- 181 ☐ Create and improve product listings
- 182 ☐ Update prices and promotions
- 183 ☐ Answer product questions and reviews with templates
- 184 ☐ Watch shipping times and tell buyers about delays
- 185 ☐ Create discount codes and track results
- 186 ☐ Check orders against payment reports
- 187 ☐ Keep product details tidy (SKUs and barcodes)
- 188 ☐ Email suppliers about lead times and stock
- 189 ☐ Check listings follow platform rules
- 190 ☐ Print pick slips and labels from your system
- 191 ☐ Track returns and make sure they are resolved
- 192 ☐ Save a weekly summary of orders and refunds

NEXT STEP

Turn your ticks into a role

Count your ticks. If you have more than 20, a full-time virtual assistant will almost certainly pay for itself in the time you get back.

Work from home

We recruit your VA and check their home setup. US\$1,999 one-off.

Core

Your VA works from our supervised office. US\$49 a week plus their salary.

Signature

Salary, equipment, payroll and HR in one fee. US\$249 a week for a general VA; specialist roles priced on enquiry.

Ready to hand over the work?

Book a free 30-minute consultation. We'll scope the role, recommend a plan and give you a clear cost. There's no obligation to go ahead.

[Book a free consultation](#)

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